



Get Ready for Chinese Visitors

Sponsored by

**Maui County Mayor's Office of
Economic Development**

and the

Maui Visitors Bureau

MAUI
VisitMaui.com 1-800-828-6384™

**MAYOR'S OFFICE OF
ECONOMIC
DEVELOPMENT**
MAUI COUNTY



Understanding Chinese Visitors

中国

CHINA



7:00 am

Beijing



5000 Years of Tumult & Transformation

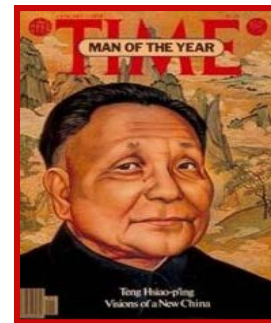


5 Rulers	27-22 c. BC
Xia	22-16 c.
Shang	16c-1066
Zhou	1066-221
Qin	221-205
Han	206 BC-220 AD
3 Kingdoms	220-280
Wei	220-265
Shu	221-263
Wu	222-280
W. Jin	265-316
E. Jin	317-420
16 Kingdoms	304-420
South-North	420-588
Tang	618-907
Song	960-1279
Yuan	1279-1368
Ming	1368-1644
Qing	1644-1911
R. of China	1911-1949

One-party rule
Central authority
Top-down style



19c. – 1948 Humiliation,
Nationalism & Wars



1978 –
Reform & Opening



1949 –
Communist Revolution



2001 – WTO



2008 – Beijing Olympics

SHANGHAI

1990



2010



A Walk Down Shanghai's Nanjing Road



A vertical collage of images representing China. From top to bottom: a Chinese passport, several Chinese banknotes (100, 20, 10, 5), two women shopping, the Chinese flag, a plate of dumplings, and two people in hats pointing upwards.

The map illustrates regional differences in drinking culture and personality traits across China. The regions are color-coded: Northern China (pink), Eastern China (light blue), Western China (light green), Southern China (light orange), and Cantonese-speaking areas (light yellow). Major cities are marked with dots.

- Beijing, Northern China:**
 - Heavier drinkers
 - More political
 - Warmer personalities
- Shanghai:**
 - Wealthy (reputation for being stingy)
- Western China (Chengdu, Chongqing):**
 - Newest wealth
 - Less sophisticated
 - Warmer personalities
- Southern China (Hong Kong, Guangzhou):**
 - Cosmopolitan
 - Flashy style
 - Cantonese, more English
- Cantonese-speaking:**
 - Guangzhou
 - Hong Kong
- Other cities marked:** Beijing, Shanghai, Chongqing, Chengdu, Taiwan.

Mandarin-speaking is indicated for the central and northern regions.

- Heavier drinkers
- More political
- Warmer personalities

- Wealthy (reputation for being stingy)

- Chongqing
- Chengdu

- Newest wealth
- Less sophisticated
- Warmer personalities

- Cosmopolitan
- Flashy style
- Cantonese , more English

● Taiwan

- Hong Kong

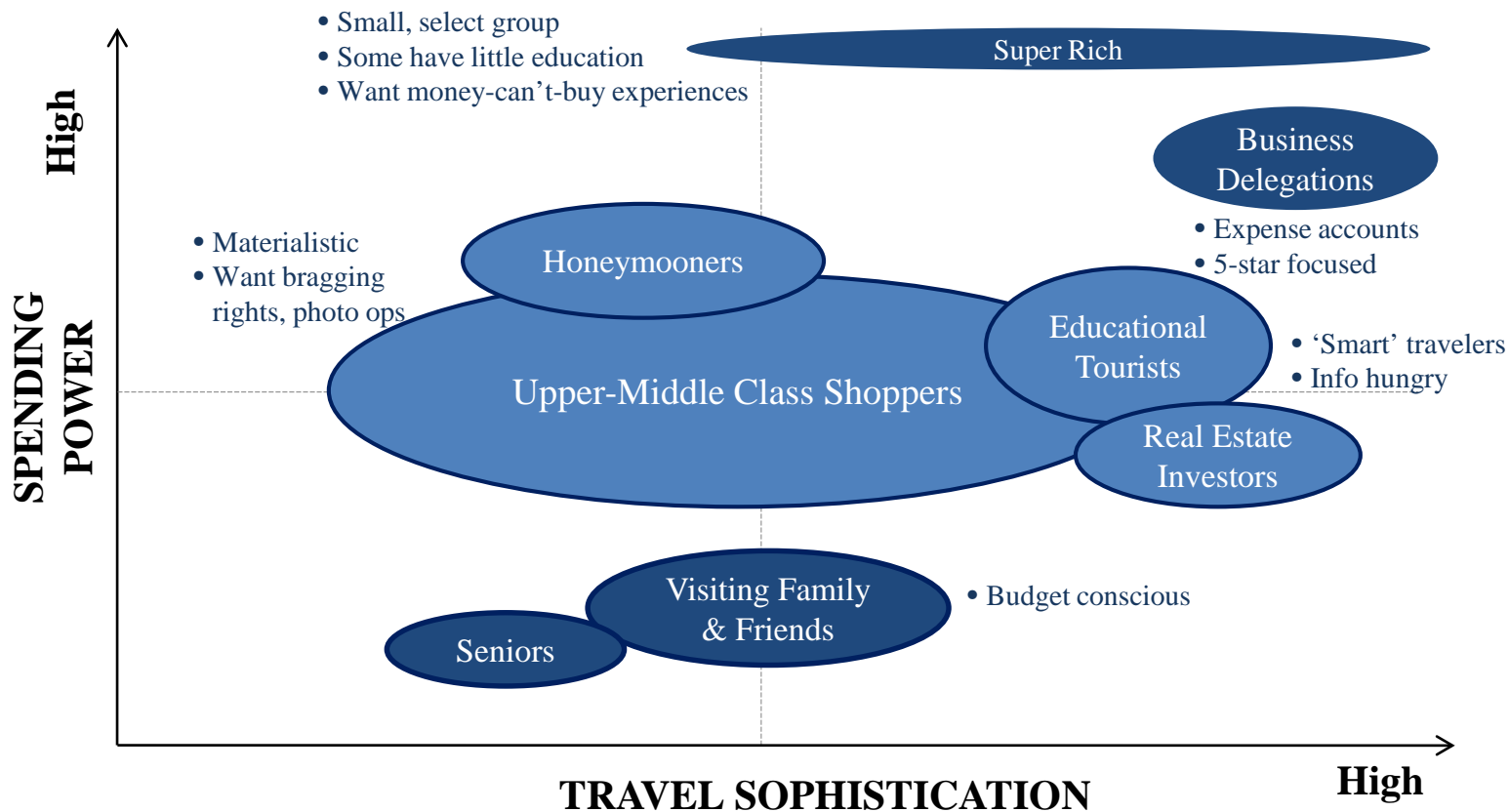
Chinese Tourists – Vast Generational Differences



Age	45+	30-45	Kids & 20-somethings
Born	Before 1970	1970-85	After 1985
Background	<ul style="list-style-type: none"> Survived severe hardships 	<ul style="list-style-type: none"> Emerged out of poverty Family first-achiever 	<ul style="list-style-type: none"> Every year has been better than last Spoiled, only child "Little emperor"
Travel Preferences	<ul style="list-style-type: none"> Safe, conservative tourist sites Familiar food Cost-conscious "Make the children happy" 	<ul style="list-style-type: none"> Luxury shoppers Photo ops Educational shopping for kids "Let's keep up with the Joneses" 	<ul style="list-style-type: none"> Heavy social media Spend parents' \$ Becoming eco-conscious Niche interests "I want it all"



Our target market segments





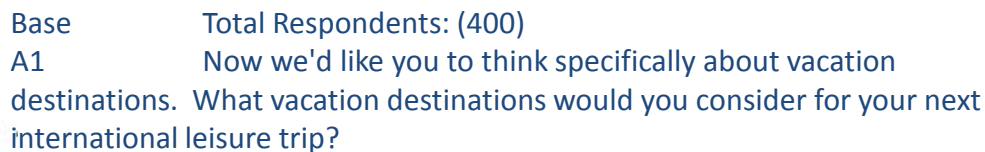
Research Among Travelers in China

- ✓ Traveler with monthly household income over \$2,500
- ✓ Past visitor of USA, Australia, or Europe
- ✓ Beijing, Shanghai and Guangzhou



A stylized palm tree with a dark trunk and green fronds. The trunk is marked with horizontal lines and percentages: 10%, 20%, 30%, 40%, 50%, 60%, 70%, 80%, 90%, and 100%. Callout boxes point to specific locations and their percentages:

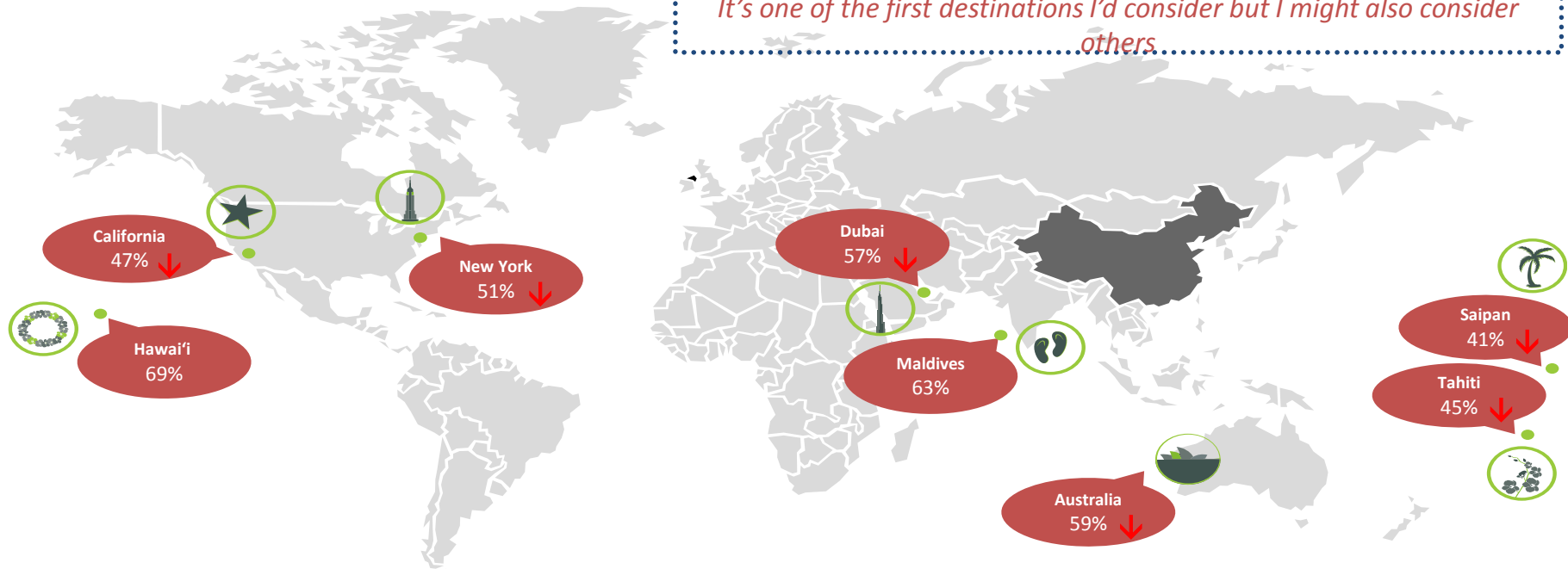
- Japan 38%
- France 33%
- USA 32%
- Australia 32%
- Hawai'i 25%
- Maldives 19%
- New York 4%
- California 2%
- Dubai 7%
- Saipan 4%
- Tahiti 2%



Among core competitors, Hawai'i is the most considered destination on par with the Maldives

Aided Destination Consideration (Next 2 Year Visitation)

*Top 2 Box Consideration: It's the only destination I would consider/
It's one of the first destinations I'd consider but I might also consider
others.*

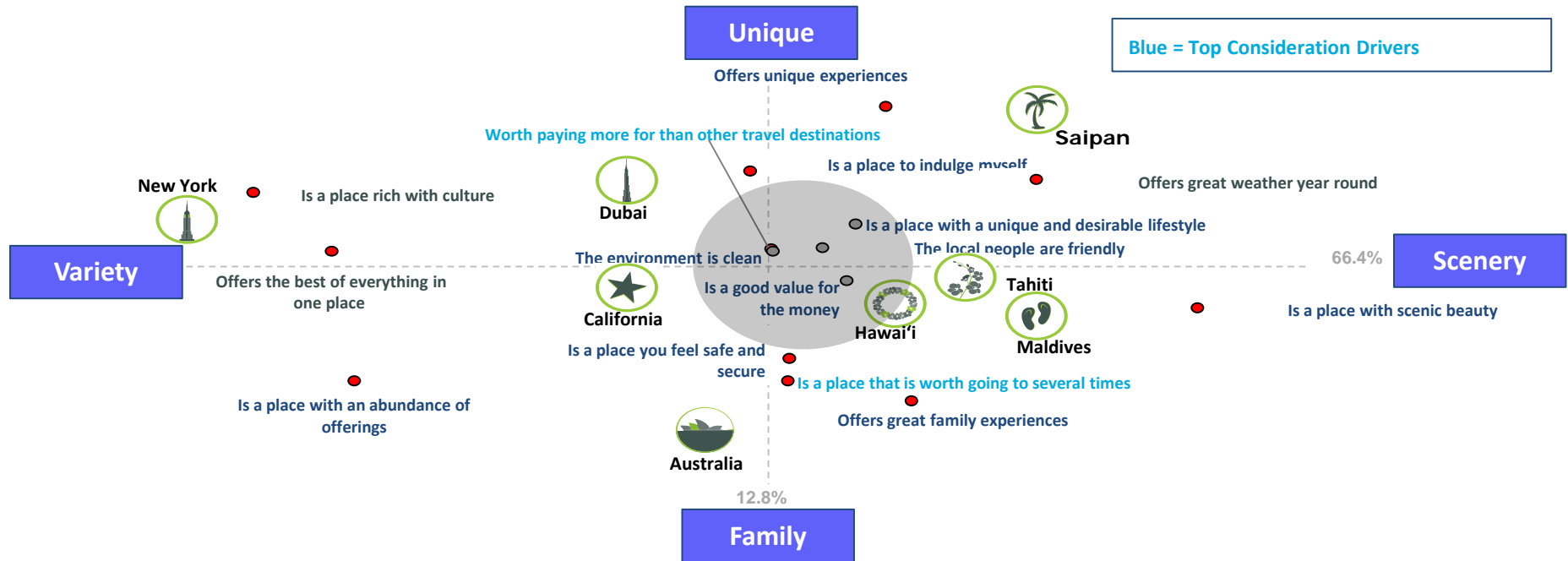


↑/↓
Base
B2

Statement is significantly higher/lower than Hawaii at 95% confidence level
Those Aware: Hawaii (400); New York (193); California (208); Maldives (157); Australia (157); Dubai (167); Tahiti (163); Saipan (155)
Consideration: How strongly would you consider visiting the following destinations in the next 2 years?

Hawai'i image is positive but not unique





Destination Imagery – Perceptual Map



Note: Yellow highlighted metrics represent top tier imagery drivers to consideration
 B5 Destination Imagery Perceptions: How well would you say the statement below describes each travel destination? Using the scale from 1-5 below, where 1 means "it does not describe the destination at all", and 5 means "it completely describes the destination."

Visas and costs are top barriers for Hawai'i; Opinions from family/friends are influential

Barriers to Visitation

	 Hawai'i	 New York	 Maldives	 Australia
Concerns over visas & travel requirements	22%	29%	18%	17%
Opinions from family, friends and co-workers	20%	19%	17%	18%
Hotels, meals, transportation and other costs are too expensive once there	20%	28% ↑	17%	15%
It's difficult for me to communicate with locals because of the language barrier	19%	15%	22%	14%
Concerns over safety (terrorism, political unrest, crime, natural disasters)	18%	34% ↑	24%	14%
It costs too much to get there	17%	20%	17%	18%
It's hard to get around within the destination	14%	14%	20%	20%
It's hard to make a last minute booking	13%	13%	11%	11%
There are no direct flights	12%	9%	10%	8%
Other destinations are more worthwhile to me	12%	16%	8%	8%
Lack of knowledge beyond major cities	11%	12%	14%	11%
Past experiences I've had there	10%	16% ↑	11%	10%
There is nothing new to experience	10%	16% ↑	9%	11%
They do not offer food that I want to eat	9%	12%	11%	13%
I don't know enough about this destination	8%	7%	10%	11%

Note:

↑/↓

Base

B6

Statements above only shown for top tier competitors

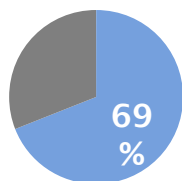
Statement is significantly higher/lower than Hawaii at 95% confidence level

Those Aware: Hawaii (400); New York (193); California (208); Maldives (157); Australia (157); Dubai (167); Tahiti (163); Saipan (155)

Barriers to Visitation: Which of the following would prevent you from visiting these destinations?

Traveler Profile – Those who would Consider Hawai‘i (Top 2 Box)

Travel Mindset



Compared to those who would not highly consider Hawai‘i ...

More likely to share travel experiences with others through social media

Post reviews on travel websites

Give family/friends trip advice



Top 3 Barriers to visiting Hawai‘i

Concerns over visas & travel requirements 24%

It's difficult for me to communicate with locals because of the 21% language barrier

Hotels, meals, transportation and other costs are too expensive once there 19%

Preferred Type of Vacation

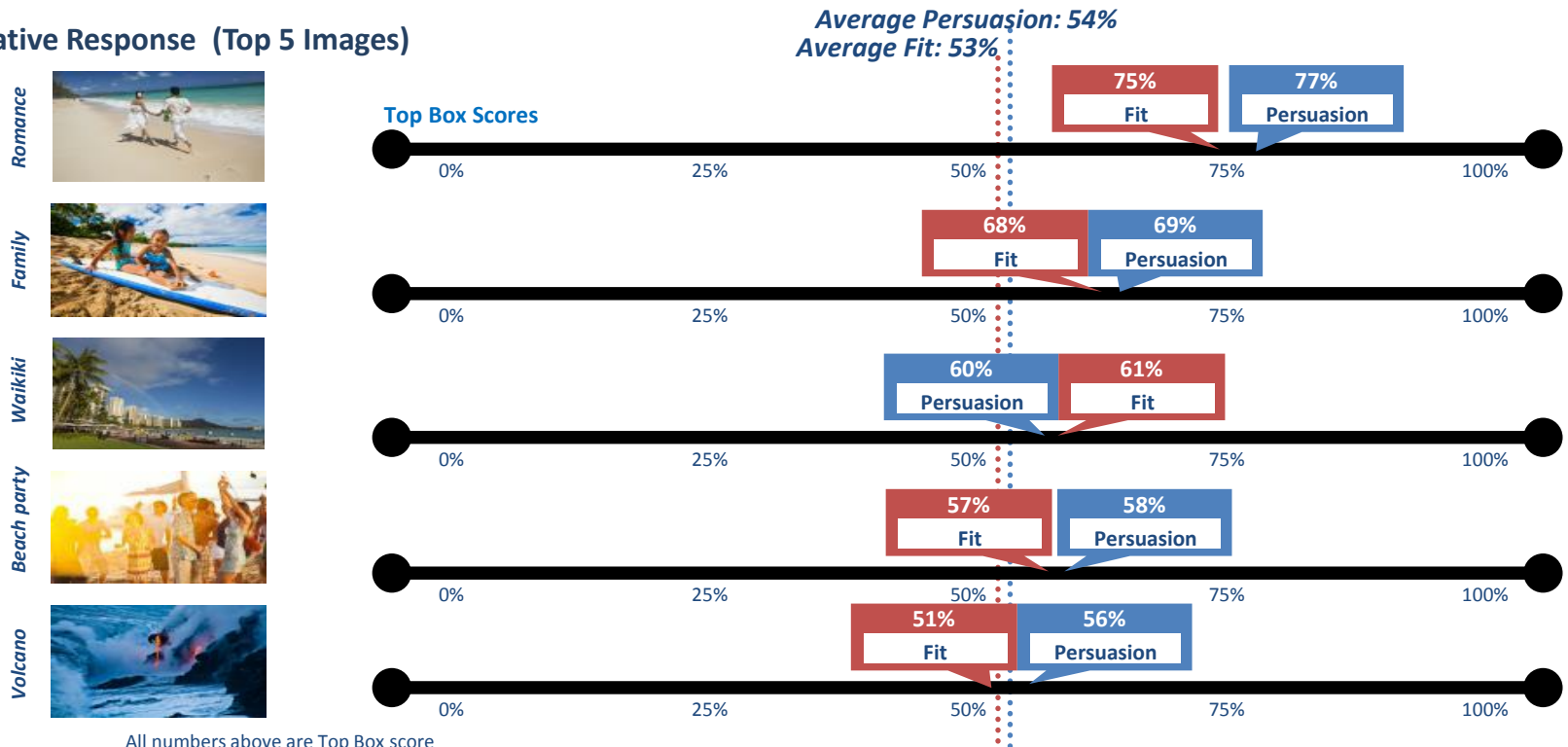
Compared to those who would not highly consider Hawai‘i ...



More likely to prefer a vacation that is relaxing + romantic or full of outdoor activities

Romance/wedding imagery is most persuasive and fits best with impressions of Hawai'i

Creative Response (Top 5 Images)



Note:
Base
C1

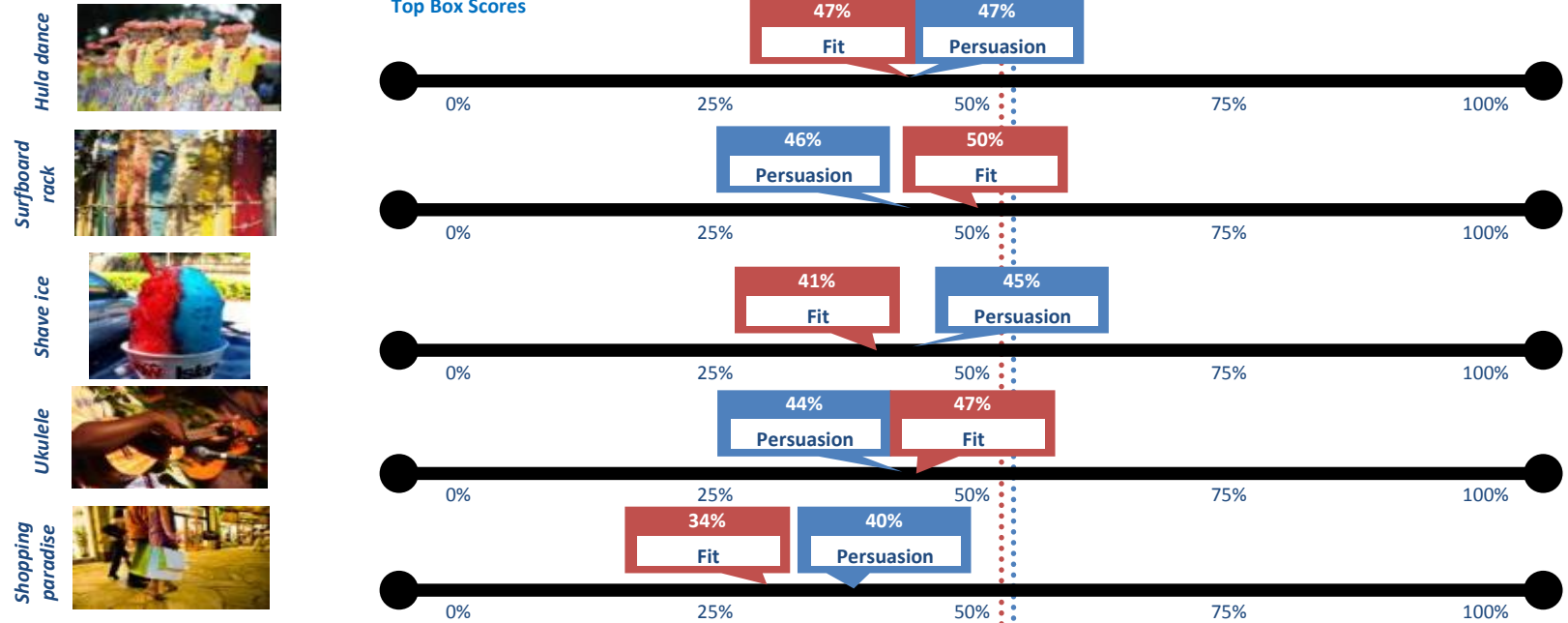
All numbers above are Top Box score

All respondents (400)

Creative Diagnostics: For each pair of statements below, please select a number on the scale that is closest to the statement that you most agree with.

Shopping imagery is the least persuasive and is not considered a strong fit for Hawai'i

Creative Response (Bottom 5 Images)



Note:
Base
C1

All numbers above are Top Box score
All respondents (400)

Creative Diagnostics: For each pair of statements below, please select a number on the scale that is closest to the statement that you most agree with.



Touchpoints

Half of Chinese travelers use word of mouth to determine and finalize their vacation destination



Touchpoints Across Stages – Offline Sources



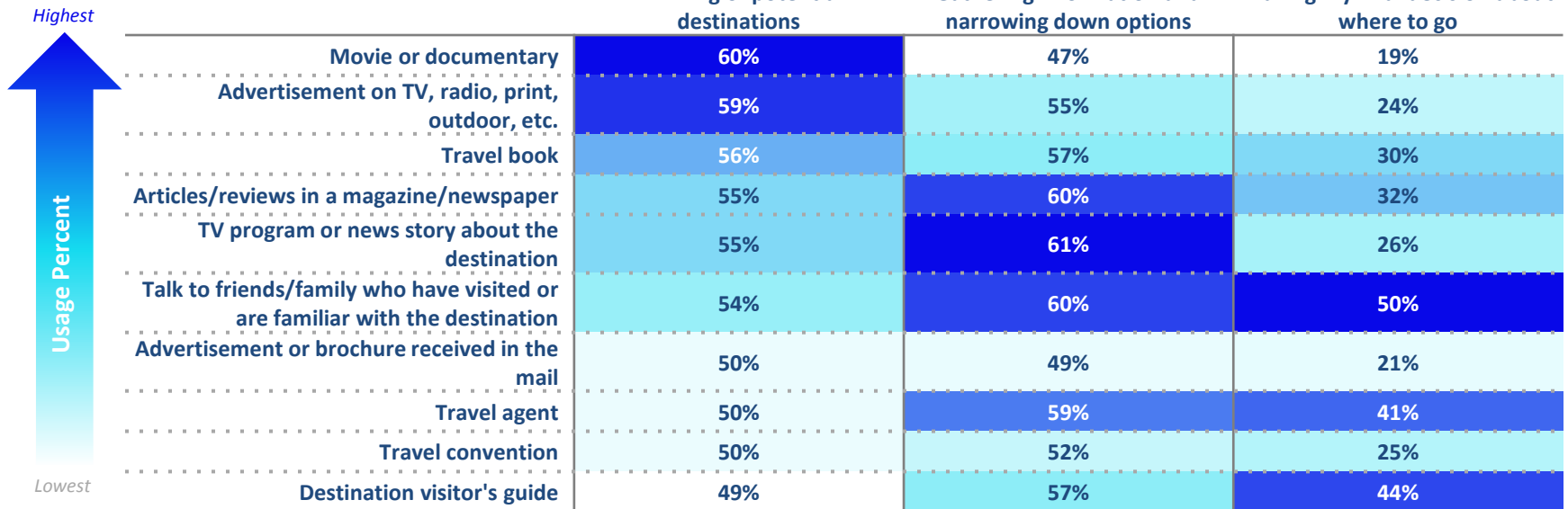
Thinking of potential destinations



Gathering information and narrowing down options



Making my final decision about where to go



- Note: Touchpoints are ranked from highest to lowest usage at “Thinking of potential destinations”
- Base: Total Respondents: (400)
- T1 Touchpoints Used – Offline Sources: Now we'd like to know which sources you use when deciding on a vacation destination. For each of the following, please select all of the stages at which you use that source.

Online booking websites are often used for research and making final vacation decisions



Touchpoints Across Stages – Online Sources



Highest

Thinking of potential destinations

Gathering information and
narrowing down options

Making my final decision about
where to go

Usage Percent

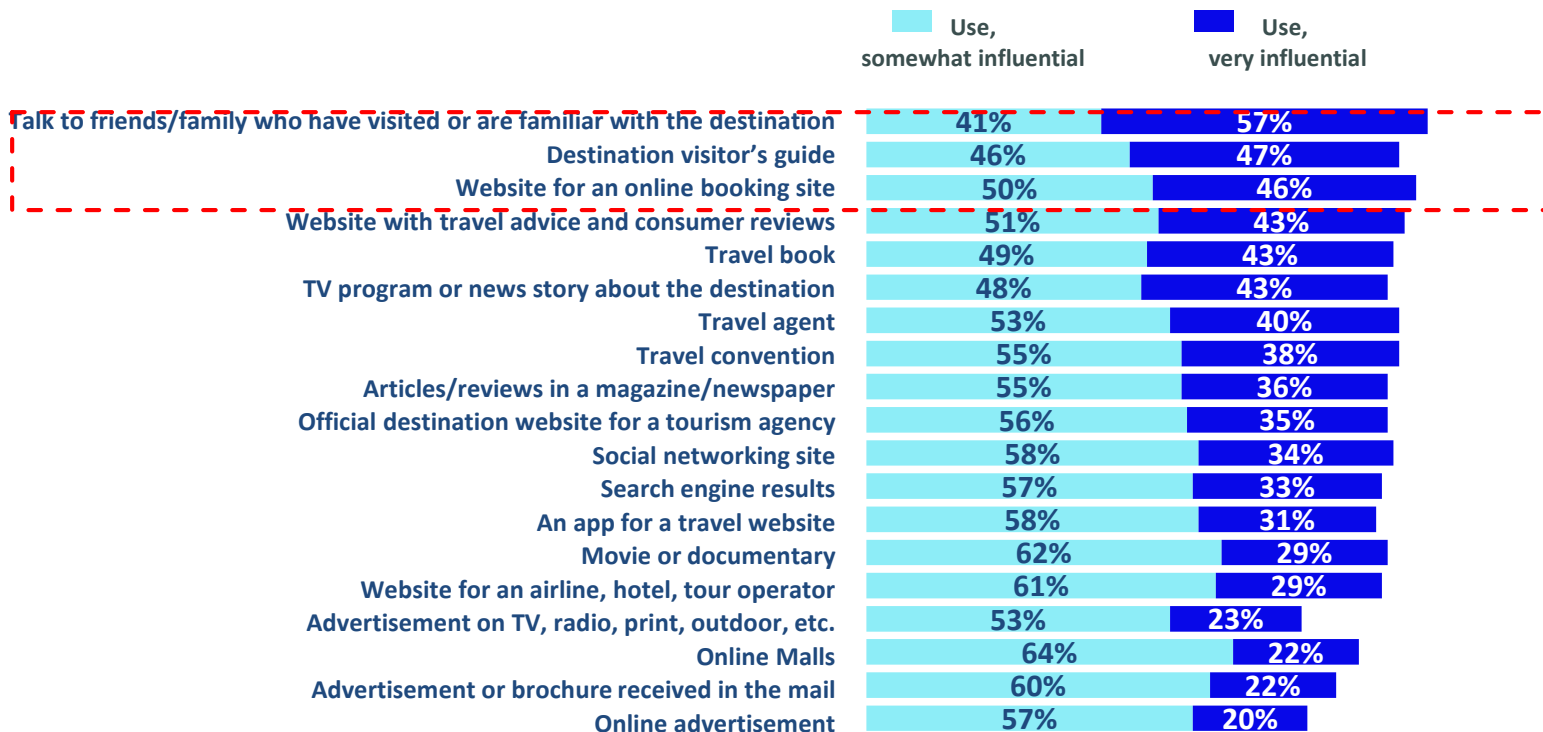
Lowest

Search engine results	59%	65%	33%
Social networking site	57%	58%	26%
Website for an online booking site	56%	64%	52%
Online advertisement	55%	41%	16%
Official destination website for a tourism agency	54%	62%	38%
Website with travel advice and consumer reviews	54%	62%	38%
An app for a travel website	50%	58%	34%
Website for an airline, hotel, tour operator	49%	60%	35%
Online Malls	42%	43%	18%

- **Note:** Touchpoints are ranked from highest to lowest usage at "Thinking of potential destinations"
- **Base:** Total Respondents: (400)
- **T1** Touchpoints Used – Online Sources: Now we'd like to know which sources you use when deciding on a vacation destination. For each of the following, please select all of the stages at which you use that source.

The most influential touchpoint in destination planning is word of mouth from friends/family

• Online/Offline Sources - Influencers in Planning



Touchpoints are ranked from high to low on "Very influential"

All respondents (400)

How influential are these sources when deciding which destination you want to travel to for vacation?

Note:
Base
T3

WOM is key for gathering information and making a decision; booking sites are used at all stages

Top Tier Touchpoints Across Decision Journey – Offline and Online



Thinking of potential destinations

Movie or documentary	60%
Advertisement on TV, radio, print, outdoor, etc.	59%
Search engine results	59%
Social networking site	57%
Travel book	56%
Website for an online booking site	56%



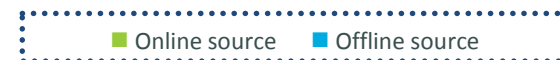
Gathering information and narrowing down options

Search engine results	65%
Website for an online booking site	64%
Official destination website for a tourism agency	62%
Website with travel advice and consumer reviews	62%
TV program or news story about the destination	61%
Articles/reviews in a magazine/newspaper	60%
Talk to friends/family who have visited or are familiar with the destination	60%
Website for an airline, hotel, tour operator	60%



Making my final decision about where to go

Website for an online booking site	52%
Talk to friends/family who have visited or are familiar with the destination	50%
Destination visitor's guide	44%



Both offline and online sources are used at all stages of planning

* Only top tier sources shown. Full list included in Appendix.

T1/T2 Now we'd like to know which sources you use when deciding on a vacation destination. For each of the following, please select all of the stages at which you use that source.



How can Maui businesses be ready to deliver that experience ?



1 – Provide Chinese-Language Materials & Custom Itineraries

- Websites, mobile apps
- Brochures
- TV channels, TV guide
- Welcome letter (hotels)
- Maps
- Museum captions
- Entertainment magazines

Custom itineraries:

- Shopping
- Education
- Real estate
- Small town America
- Luxury lifestyles
- Eco-tourism



Packaged to “speak” to Chinese tourists:

- * *Chinese historical references*
- * *Chinese celebrity endorsements*

1 – Provide Chinese-Language Materials & Custom Itineraries



Chinese tourist menu design:

1. Photo of each food item
2. Chinese-English translation
3. Price

*Easy food recognition,
point-to-order*



2 – Train Staff to Welcome Chinese Guests

- **Encourage staff to interact with Ch. visitors**
 - Show interest, be chatty
 - Play with their kids
 - When drinking, toast guests individually
 - Pull them on stage
 - For delegations, introduce boss to shake hands and receive business cards (use both hands)





2 – Train Staff to Welcome Chinese Guests

- **Demonstrate you are interested in Chinese culture**
 - Learn a few common Chinese phrases



Hello	Ni hao
-------	--------

Welcome	Huan ying	欢迎
---------	-----------	----

Thank you	Xie xie
-----------	---------

Good bye	Zai jian
----------	----------

你好

“Hwan-ying”

谢谢

再见

Pronunciation

“Knee-how”

“Shay-shay”

“Zie-jen”

3 – Accommodate Chinese Dining Preferences

- Chinese eat collectively, like to share food (may put dishes in middle of table)
- Enjoy buffets
- Prefer noodles, cooked vegetables, spicy foods (not cold dishes)
- Rather have soup than salad
- Smaller portions of meat
- Do not put ice in drinks (ask if they prefer hot/warm water)
- Eager to try seafood (esp. lobster, crab)
- Less focus on desserts
- Not used to tipping



3 – Accommodate Chinese Dining Preferences

Chinese tourists prefer to start their day with their Chinese food ...

so provide a simple Chinese breakfast option



Rice soup



Noodles



Fried dough



Hard Boiled Eggs

Consult a Chinese supermarket ... or just serve chicken-rice soup, hard boiled eggs and hot soy milk

4 – Prepare Technology to Accommodate Chinese Tourist Needs

- Free Wifi (w/Chinese interface)
- Charging stations, adapters
- Unionpay
- WeChat + QR codes



UnionPay 银联

Bank of New Zealand

IT'S GOOD TO KNOW YOUR UNIONPAY CARD IS AT HOME IN NEW ZEALAND AS WELL.

在新西兰，您可以像在您的家中一样使用您的中国银联卡。

Did you know that you can use your UnionPay card at any BNZ ATM? Plus, you can shop with confidence at over 7700 retailers nationwide.

您知道吗？现在您可以在BNZ银行任何一台自动提款机使用您的中国银联卡！当然，您也可以在遍布新西兰的超过7700个零售店自如地使用您的中国银联卡。

bnz.co.nz/unionpay

You may be charged by your bank for using this service, for more information on how to use your UnionPay card in New Zealand and for real time exchange rates, please call: 0800 450 831.



Best Practice: Hilton Huanying Program

Hilton Hotels & Resorts launched a program which tailors their experience to the Chinese traveller across three key touch points:



1. **Arrival experience** includes a front desk team member fluent in Mandarin Chinese
2. **Guest room** offers amenities for Chinese travellers, including tea kettles, Chinese teas, slippers, Chinese TV channels and a welcome letter in Chinese
3. **Breakfast** includes traditional Chinese breakfast items

The program is currently offered at 15 Hilton European locations

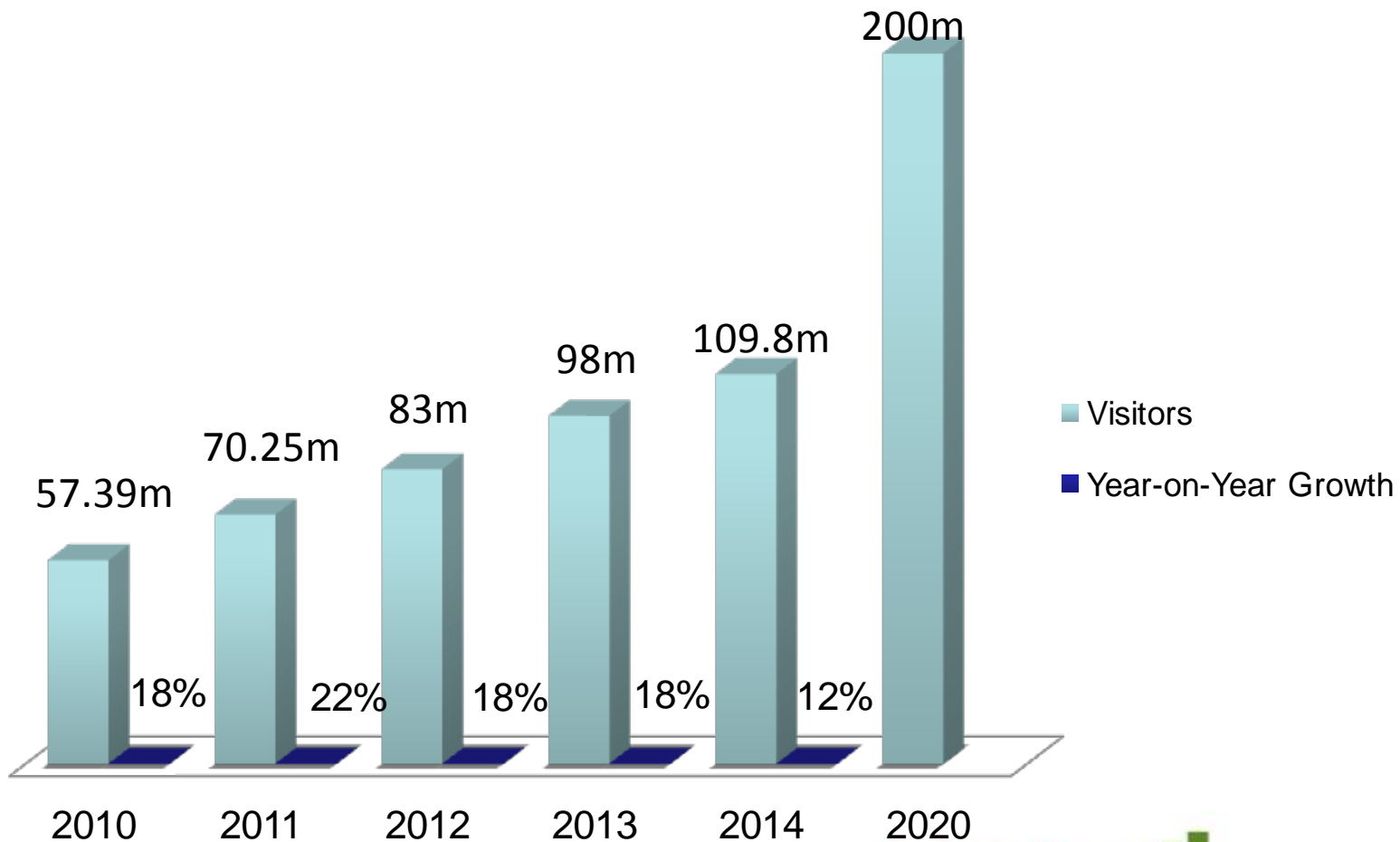


What HTChina is doing?

中国

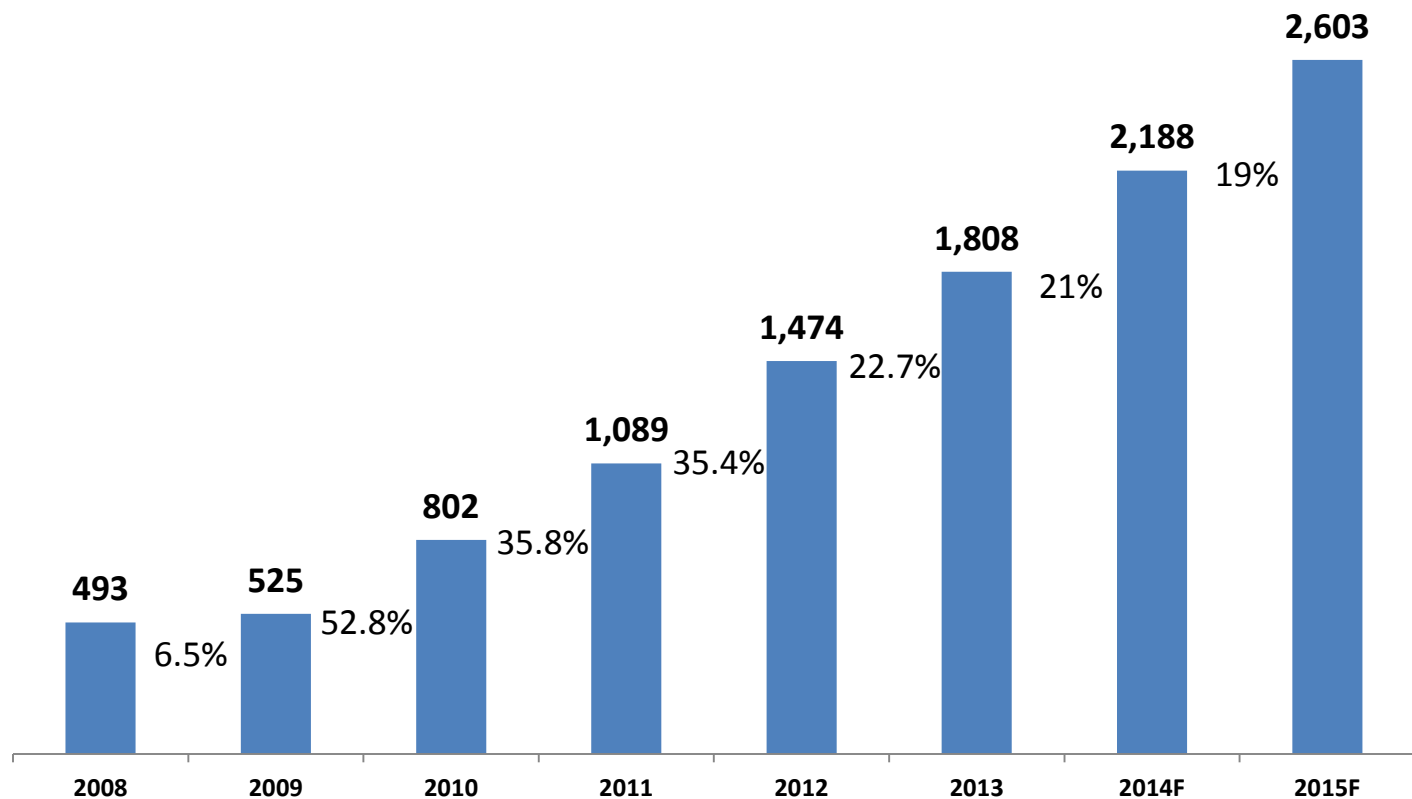
CHINA

China Outbound Travel



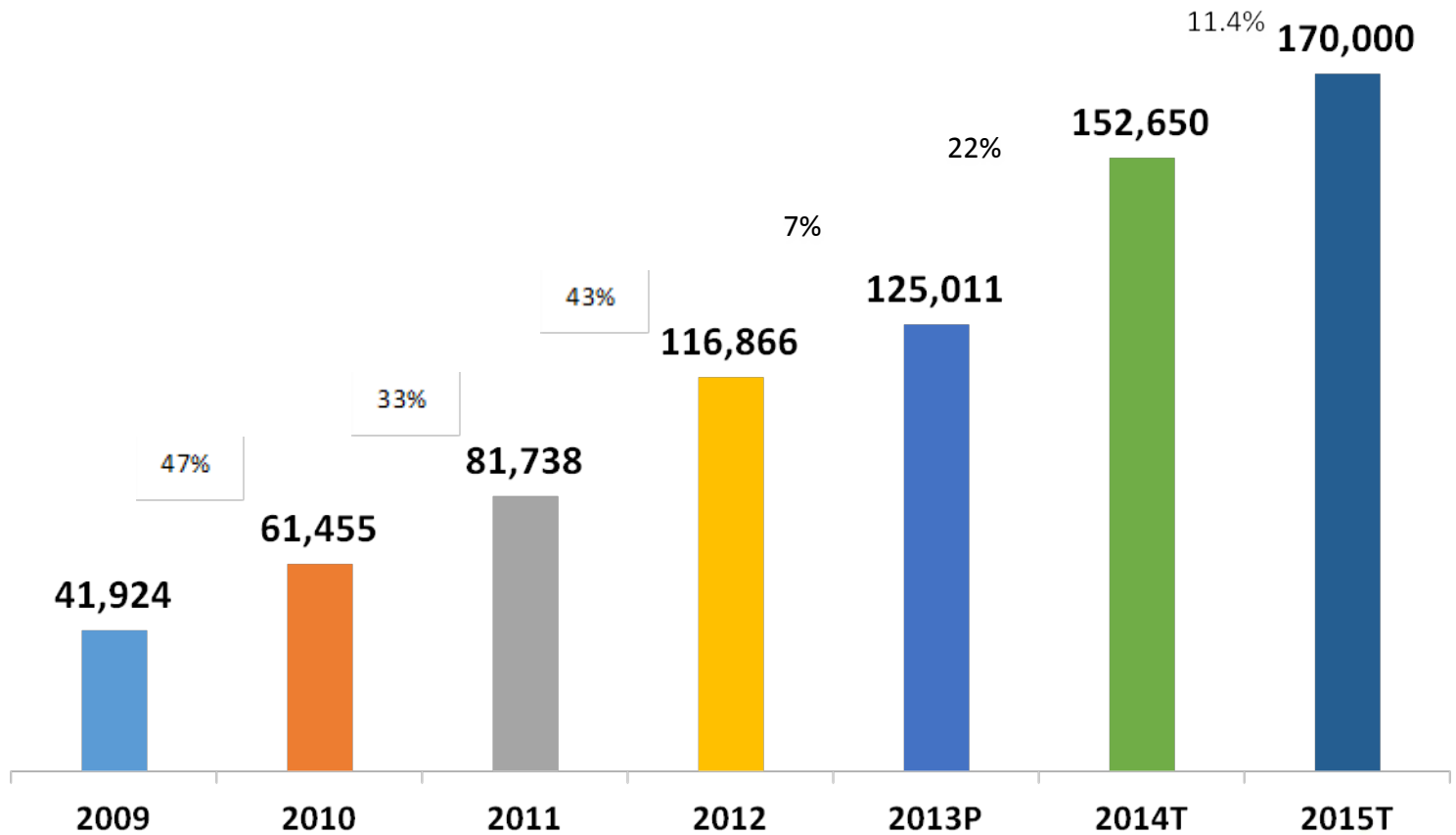
Source: CNTA & CLSA

China Outbound to USA



Source: U.S. Department of Commerce. April 2014. ('000)

China Outbound to Hawai'i





China Outbound to Maui County

	2010	% Chng	2011	% Chng	2012	% Chng	2013	% Chng
Maui	6,683	+39.2%	10,564	+58.1%	15,343	+45.2%	18,789	+22.5%
Moloka'i	579	+43.0%	934	+61.3%	1,560	+67.0%	1,034	-33.7%
Lāna'i	464	+29.6%	1,090	+134.9%	641	-41.2%	718	+12.0%



2014 YTD (Jan – July)

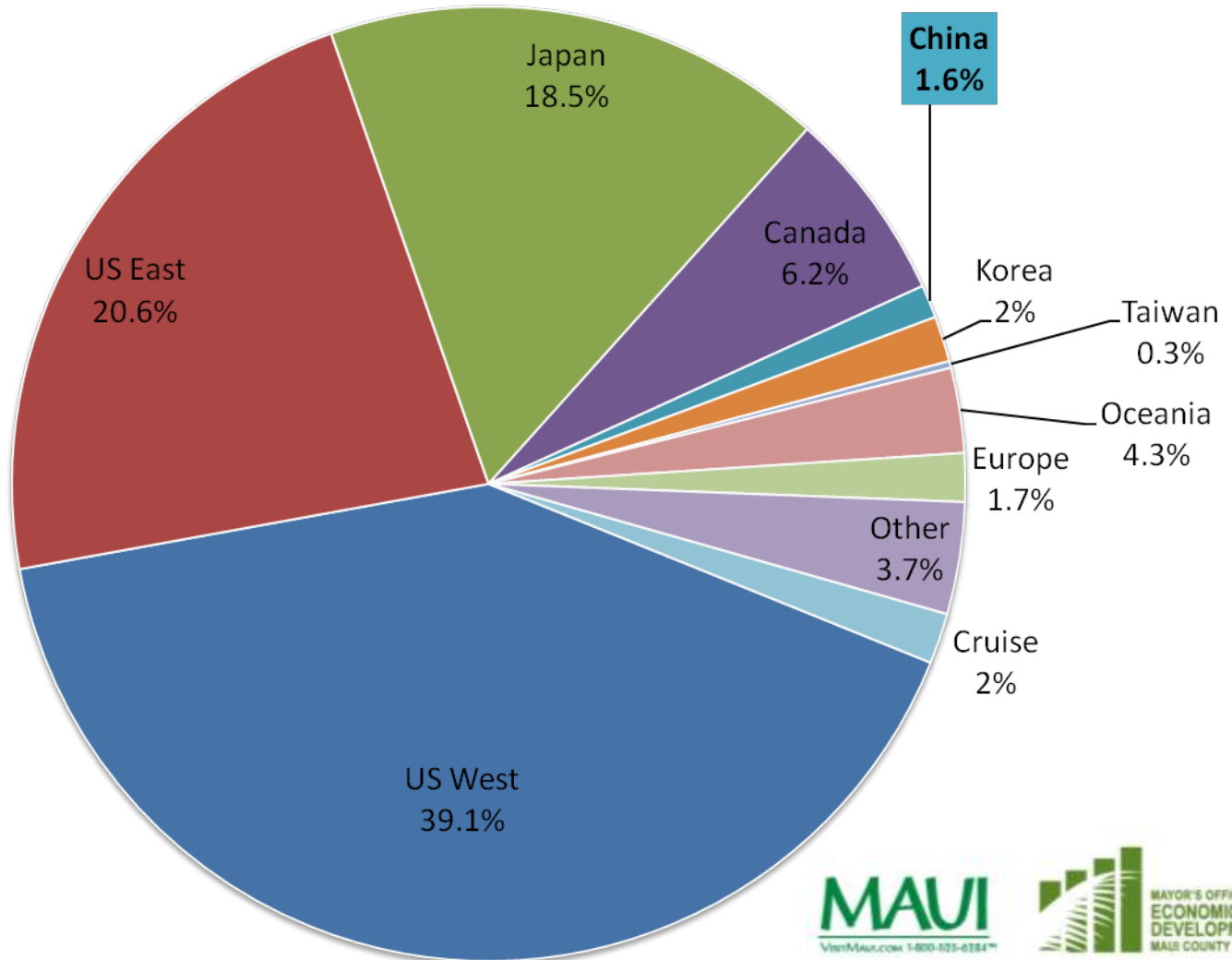
Arrivals	YOY	YTD
O'ahu	31.1%	95,130
Maui	41.6%	16,740
Kaua'i	16.3%	3,349
Hawai'i Island	64%	20,414



China Outbound to Other Destinations

Thailand	Korea	Malaysia	Japan	Australia	New Zealand	Maldives
4,705,173	4,326,869	1,791,423	1,390,446	715,360	228,928	331,694

2013 MMA Arrivals to Hawai'i





Market Profile

2013

- Expenditures: 394M
- Arrivals: 125,011
- LOS: 6.19 days
- PPPD: \$394



PPPD Breakdown (2014 Jan-Jun)

	China	Korea	Japan
FOOD	52.2	56.4	51.4
ENTERTAINMENT & RECREATION	27.2	24.7	19.1
TRANSPORTATION	29.9	22.5	12.1
SHOPPING	178.8	70.7	79.0
LODGING	91.6	85.6	102.8
ALL OTHER EXPENSES	12.0	2.9	14.5
TOTAL EXPENSES	391.7	262.9	278.9



Market Profile

First Timers	Repeaters
85.2%	14.8%

Group Tour	Non-Group
51%	49%

Package Trip	No Package
71%	29%



Market Profile

Pleasure/Vacation	87%
Honeymoon/Get Married	7.2%
MCI	7.7%



Island Distribution

O'ahu	Hawai'i Island	Maui	Kaua'i	Moloka'i	Lāna'i
95%	15.9%	15.0%	3.0%	0.8%	0.5%

Airlift - Direct Service

2014 Total Seats: 139,473
(+225% YOY)



Beijing

Shanghai

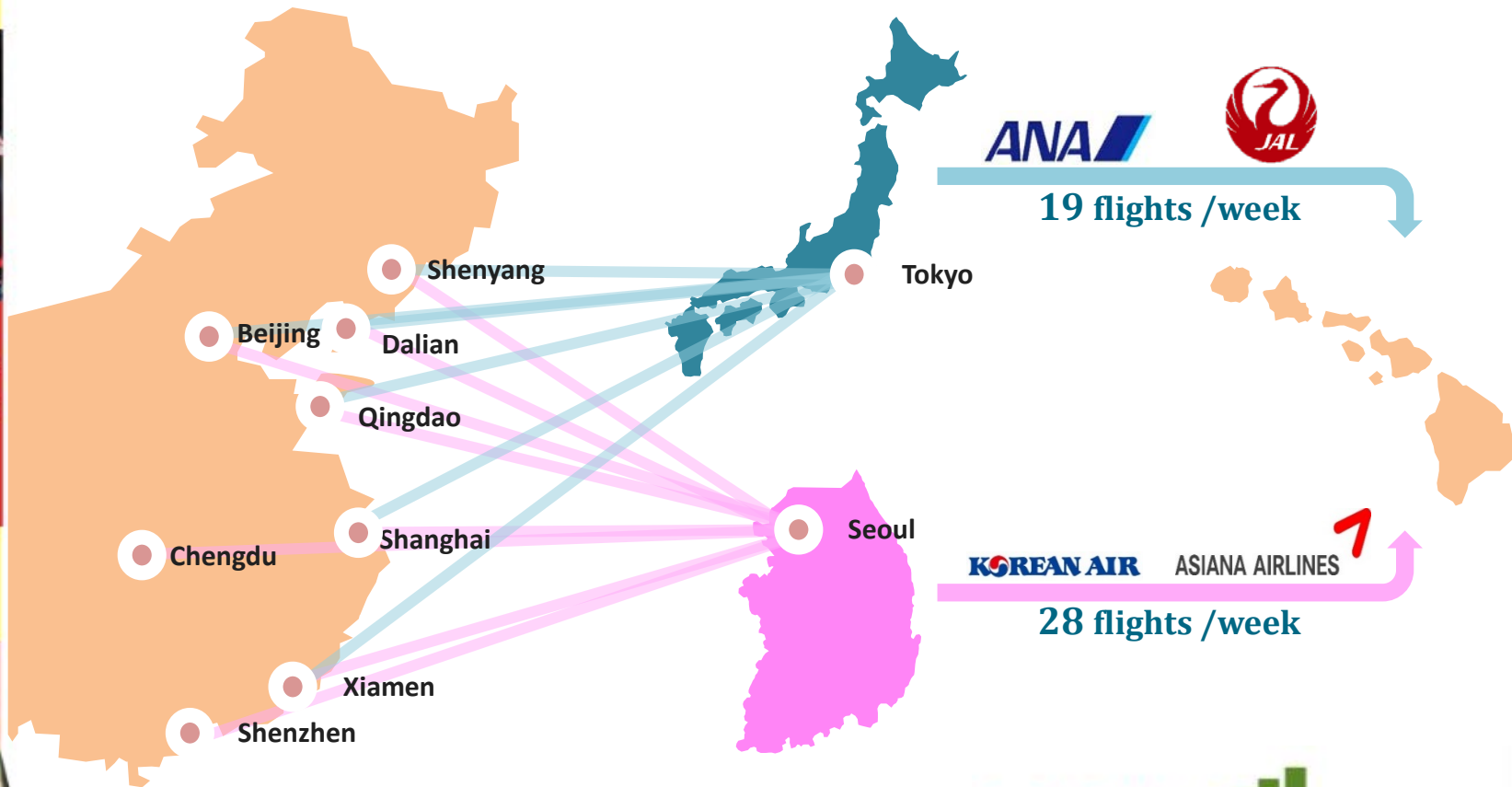


6
flights
/week

5
flights
/week



Airlift - One-stop Service





Romance Hawai'i Campaign

Beijing

Shanghai

Guangzhou



Hawai'i Micro Movie



专辑 《旅行家》 冒险王明道强势回归 带...

8个视频，总播放：10,338,406



《旅行家》 冒险王明道强势回归 带你玩转夏威夷

播放：10,036,994



《旅行家》 明道夏威夷冲浪首秀 辣妹教练贴身作陪

播放：18,660



《旅行家》 明道夏威夷皇家酒店体验天价特殊服务

播放：141,999



《旅行家》 明道夏威夷皇家酒店体验天价特殊服务

播放：141,999



《旅行家》 独岛港二战超级战舰

播放：28,745

14 Feb - 13 Mar
VV: 10.33 million

☆ 关注

分享

下载

用手机看

125

3

1033.8 万次播放

China Leisure & MCI Sales Missions



Leisure: 31 Hawai'i partners & 400 travel agents
MCI: 9 Hawai'i partners & 120 travel agents



Media & Agent FAMs

- 20 Top Media & 22 Key Agents
- More than 2 million RMB in media exposure





Road Shows to Top Tier 2 Cities

Northern China:

1. Tianjin
2. Qingdao
3. Shenyang
4. Dalian
5. Jinan

Southwest China:

1. Chengdu
2. Chongqing
3. Xian



12 cities – over 1,000 travel agents

Southern China:

1. Xiamen
2. Shenzhen

Eastern China:

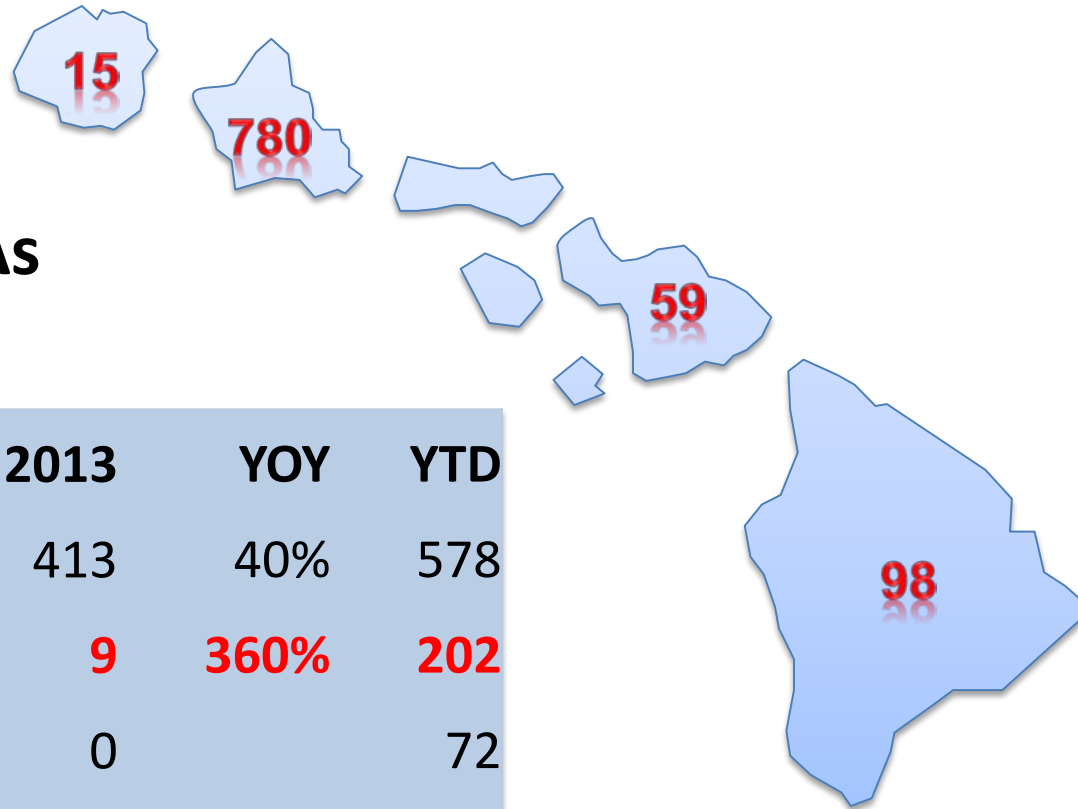
1. Hangzhou
2. Nanjing



Brochure Audit – Hawai'i Products

87 TOs + 20 OTAs

Product	2013	YOY	YTD
US Mainland+Hawai'i	413	40%	578
Hawai'i Stand-Alone	9	360%	202
FIT	0		72
Honeymoon	3		61
Golf	4		39
Family	0		13





2015 China Key Initiatives



Sustain/Grow Air Seat Capacity

Travel Trade Education & Collaboration

Product Development

Grow MCI

Increase Online & Social Media Presence

Hawai'i Capacity Building



Partnership Opportunities

- Trade and Media FAM Trips
- eNewsletters
- Press Releases
- Social Media Promotions
- China Sales Mission: March 16-20, 2015
- Road Shows/Workshops
- Joint Sales Calls



Mahalo !

Hawai'i Tourism Authority

Jadie Goo

Tourism Brand Manager

808-973-2252

jadie@gohta.net

Hawai'i Tourism China

Ivy Gao

Account Director

86-10-64384924

beijing@hawaiiitourism.com.cn

MAUI
VisitMaui.com 1-800-828-6384™

**MAYOR'S OFFICE OF
ECONOMIC
DEVELOPMENT
MAUI COUNTY**